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Broadcasting Jul 10

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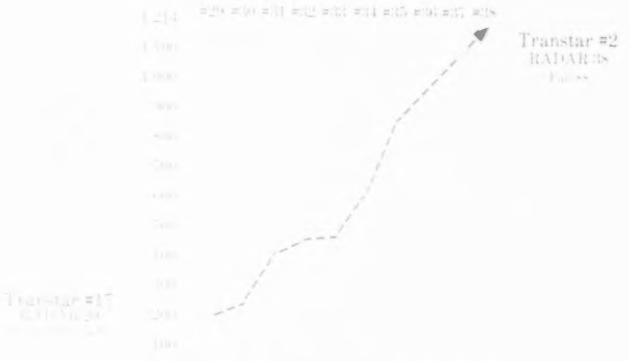

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Spot Outlook '89

Vol. 117 No. 2

Broadcasting Jul 10

Spot check... Overall spot television growth appears to match earlier predictions of 3%-5% increase over last year. **PAGE 27.**

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Comparative Licensing

Compulsory License

Crossownership

Direct Broadcast Satellites

BY THE NUMBERS

Summary of broadcasting and cable

BROADCASTING			
SERVICE	ON AIR	CP's *	TOTAL *
Commercial AM	4,953	263	5,216
Commercial FM	4,200	733	4,933
Educational FM	1,393	255	1,648
■ Total Radio	10,546	1,251	11,797
FM translators	1,728	341	2,069
Commercial VHF TV	547	23	570
Commercial UHF TV	524	215	739
Educational VHF TV	122	5	127
Educational UHF TV	218	27	245
■ Total TV	1,411	270	1,681
VHF LPTV	300	205	505
UHF LPTV	324	1,508	1,832
■ Total LPTV	624	1,713	2,337
VHF translators	2,722	121	2,843
UHF translators	2,133	443	2,576

CABLE†	
Total subscribers	49,538,000
Homes passed	73,900,000
Total systems	8,000
Household penetration†	54.8%
Pay cable penetration	32%

* Includes off-air licenses. † Penetration percentages are of TV household universe of 90.4 million. ‡ Construction permit. ** Instructional TV fixed service. †† Studio-transmitter link.

sounds like bad advice.

Robert Benson, vice president of radio news for ABC News, made a succinct observation in his Jan. 5 "Monday Memo": "The most popular and successful radio stations over the years built their franchises with the public largely through maintaining a strong news and information presence.... A strong news and information station is a strong financial investment. It's as simple as that."

Why don't we apply that advice to our AM stations? Let's adopt the following: Radio is meant to inform, to advise, to amaze and to entertain. If we do these simple things, all this talk about AM radio's demise is certainly premature.—*Edward D. Allen Jr., president, WDOR-AM-FM Sturgeon Bay, Wis.*

Fan mail

EDITOR: My congratulations on the birth of your new publication, BROADCASTING■CABLE. I saw the first issue at the National Cable Television Association convention and immediately filled out a subscription form as I'd like to continue to receive this publication (along with my BROADCASTING magazine each week). I want to wish you the very best of everything and I'm sure BROADCASTING■CABLE will be just as useful a tool as is BROADCASTING.—*Edward M. Allen, general partner, InterMedia Partners, Walnut Creek, Calif.*

EDITOR: Congratulations on the first two editions of BROADCASTING■CABLE.

I'm one of those cable people who have read BROADCASTING for years, beginning before its excellent coverage of cable was widely recognized within our business—and, for the record, before its association with the Times Mirror Co. I imagine it will continue to offer the best overall, in-depth treatment of radio, broadcast television, cable and satellite. I wish you the best in your new venture as well and look forward to watching it grow.—*Christopher B. Forgy, senior vice president, marketing, sales and programing, Times Mirror Cable Television, Irvine, Calif.*

Wrong directions

EDITOR: It is disappointing to read about the efforts of those who are using their influence to regulate broadcasters to conform to their own personal agendas. At the top of the list are Governmental Affairs Committee Chairman Senator John Glenn of Ohio and retiring Surgeon General C. Everett Koop.

President Eddie Fritts of the National Association of Broadcasters has done an excellent job of presenting the case for broadcasters.

The critics may be surprised to know that broadcasters did not create ills such as scandals in government, AIDS, cruelty to animals, child, drug or alcohol abuse. We advertise a multitude of products and services and any dumbbell should know the proper use is implied.

Automobiles and gasoline are advertised but if a person drives 70 miles per hour in a 30 mph zone, he is apt to have an accident and kill someone. Should we follow Dr. Koop's thinking and stop automobile and gasoline advertising? No one has ever gotton drunk seeing or hearing a beer commercial.

The critics are trying to cut up the Constitution to make their little paper dolls and leave broadcasters in the armpits of their creations. The Constitution is for all people. The First Amendment should be left intact.

Senator Glenn and Dr. Koop have benefited from broadcasting in their leadership roles in the country. They have a very strange way of saying "thanks."—*Charlie Wright, general manager, WBYS-AM-FM Canton, Ill.*

Real world realities

EDITOR: It was with interest and not a little chagrin that I read the June 12 letter from Mr. Michael Biehl in which he seems to take delight in dragging over the coals the hand that feeds him. Unfortunately, this is not the first time I have encountered this attitude in the academic world.

As an independent engineer specializing in small markets I have the opportunity to see stations operating in the "public interest, convenience and necessity" every day. For the most part they are doing an incredible job. What Mr. Biehl fails to realize is that there are over 10,000 radio stations out there, none of which has tenure. I know of some stations operating on such a tight budget that a couple hundred dollars a month can make or break them.

The frightening thing is that people with attitudes like this are training our future broadcasters. Please, Mr. Biehl, either come down from your ivory tower or teach another subject.—*Michael K. Seaman, independent engineer, Albuquerque, N.M.*

A/B absurdity

EDITOR: I read with great interest the May 29 BROADCASTING article "A/B switch requirements take effect Nov. 1." I find this to be an absurd ruling. If you have cable, you most likely don't have much more than rabbit ears. Cable operators should carry *all* local stations and putting an A/B switch on a cable box is dark ages thinking. While the FCC mandates an educational project for an A/B switch, they ignore linear stereo radio which could help AM survive. I still don't have a choice in cable companies, therefore regulation is in order. Carry the locals and be a part of the community you're doing business in.—*Dwight Douglas, president, Burkhart/Douglas & Associates, Atlanta.*

Out of China

EDITOR: Since 1984, Shane Media Services has participated in several projects with China's Central Radio and with Radio Beijing.

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We are stunned by the massacre of Chinese citizens who sought a voice in their

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Time, is "actively considering" a bid for the company.

In a hearing in Delaware Chancery Court Tuesday, Paramount's lawyers will argue that Time's plans, announced in March, to merge with Warner Communications effectively put Time up for sale.

Stemming from this interpretation, Paramount is seeking to overturn various obstacles that, according to its allegations, unfairly stand in the way of its $12.2 billion tender offer for Time. Because of the speed at which the Delaware court can operate, a decision in the case could be reached as early as the end of next week.

Confirmation of Cablevision's interest in an acquisition of Time came in a July 3 letter from a Time lawyer to the Delaware judge hearing the case. The letter states that a Cablevision affiliate, Cablevision Media Investors L.P., would not produce certain documents for the case because of its bid for Time. The limited partnership was one of three Time shareholders that one week earlier had unsuccessfully sought to delay the June 30 shareholder meeting.

In separate news, Paramount disclosed that Time shareholders have tendered approximately two million shares of common stock to Paramount in response to its $200 per-share tender offer. Paramount, seeking 32.3 million shares of Time stock, said it moved the expiration date of its tender offer to Friday, July 28.

On Friday, Time's stock dropped $4.125 to $151.50, well below Paramount's offering price. Paramount closed the week at $57, down $2.25 from where it had closed the Friday before. □

ABC can keep radio stations

FCC grants permanent waiver of one-to-market rules, allowing network to keep its properties in N.Y., Chicago, L.A. and San Francisco; Great American's petition is still pending

After three years of uncertainty, Capital Cities/ABC can rest easy. It will get to keep its radio stations in New York, Chicago, Los Angeles and San Francisco.

The FCC, inaugurating the liberal waiver policy of its so-called one-to-a-market rules that it adopted seven months ago (BROADCASTING, Dec. 19, 1988), granted Capcities/ABC a permanent waiver of the rules, allowing it to maintain radio-television combinations in the four major markets.

The combinations: WABC-AM-TV-WPLJ(FM) New York; WLS-AM-TV-WYTZ(FM) Chicago; KABC-AM-TV-KLOS(FM) Los Angeles, and KGO-AM-TV San Francisco. Without the waiver, Capcities/ABC would have sold the radio stations to comply with the cross-ownership rules.

"We are obviously pleased with the decision," said Jim Arcara, president, Capcities/ABC Radio. "It means we will be able to stabilize our operations in all four cities. It has been difficult in some cases to attract people. It has been difficult to make any long-term commitments when you know you may not be able to keep the stations."

Still pending at the FCC is a similar petition for waiver filed by Great American Broadcasting (formerly Taft Broadcasting), which is seeking to hang on to combinations in Cincinnati (WKRC-AM-TV and WKRQ[FM]) and Kansas City, Mo. (WDAF-AM-TV and KYYS[FM]).

Bernie Koteen, a Washington attorney for Great American, was unsure when the FCC would act on the Great American petition, but speculated that action may be delayed because Great American must meet a tougher standard and because its petition is "trapped in the same shop [the video services division of the Mass Media Bureau] that is handling the McCaw-LIN and Paramount-Time takeovers. I suspect that there is a crisis every day involving those, with filings piling up."

The FCC let stand the one-to-a-market rules prohibiting new radio-television combinations, but it also adopted a waiver policy that should make it easier for broadcasters to obtain waivers, especially for stations in the top 25 markets.

Under the new case-by-case waiver policy, the FCC said it would "look with favor" upon waiver requests involving radio-television combinations in the top 25 markets that have at least 30 separately owned broadcast licensees, or, as the FCC calls them, "voices."

The FCC also said it would consider waiver requests for combinations that did not meet the 25-30 standard, but that the agency would not be favorably predisposed to grant them. Indeed, it said, they would be subjected to a more rigorous review in

Cable ratings: second quarter box score

Eleven of the largest basic cable networks posted a combined gain of 1.1 rating points in the second quarter of 1989, rising from 12.5 last year to 13.6. The increase was largely attributed to Turner Network Television's 1.3 rating (it was not in existence last year) and USA, which rose from a 1.6 rating to a 2.1. Without TNT, the other nine networks dropped 0.2 in prime time, quarter to quarter.

USA's substantial increase could be partially traced to the strong performances of *Miami Vice* and *Murder, She Wrote*, USA said. In prime time, USA was up 31% in rating and 42% in household delivery. It also doubled its ratings in late fringe, in the 11 p.m. to 3 a.m. block, it said.

TNT continued to show solid numbers, scoring a 1.3 in prime time and a 0.8 for its full day ratings. In the first quarter of the year, it scored a 1.4 rating in prime time and a 0.8 overall. When it launched, it was projecting a 0.6 for a total day rating. Discovery's drop was not as large as indicated, because it scored a 0.73 this quarter versus 0.76 last year.

Network	*Prime Time*				*Full Day*			
	2Q '89 Rating	*(HH)*	*2Q '88 Rating*	*(HH)*	*2Q '89 Rating*	*(HH)*	*2Q '88 Rating*	*(HH)*
WTBS	2.8	(1,377,000)	3.0	(1,364,000)	1.5	(751,000)	1.8	(809,000)
USA	2.1	(1,021,000)	1.6	(717,000)	1.1	(507,000)	0.9	(401,000)
ESPN	1.4	(700,000)	1.3	(601,000)	0.7	(355,000)	0.6	(301,000)
Headline News	1.3	(636,000)	1.3	(605,000)	0.8	(430,000)	0.8	(374,000)
TNT	1.3	(355,000)	—	—	0.8	(224,000)	—	—
Nashville	0.9	(416,000)	1.1	(446,000)	0.4	(193,000)	0.5	(212,000)
Lifetime	0.9	(400,000)	1.1	(419,000)	0.6	(266,000)	0.6	(232,000)
CBN	0.9	(398,000)	0.9	(372,000)	0.7	(310,000)	0.6	(248,000)
A&E	0.8	(310,000)	0.9	(297,000)	0.4	(140,000)	0.3	(91,000)
Discovery	0.7	(301,000)	0.8	(246,000)	0.4	(166,000)	0.4	(131,000)
BET	0.5	(112,000)	0.5	(107,000)	0.5	(105,000)	0.4	(84,000)
Nickelodeon	—	—	—	—	1.1	(506,500)	1.0	(408,000)
MTV	—	—	—	—	0.6	(277,900)	0.6	(252,000)
Nick at Nite	—	—	—	—	0.5	(230,200)	0.5	(181,600)
FNN	—	—	—	—	0.3	(96,000)	0.1	(42,000)
VH-1	—	—	—	—	0.2	(65,500)	0.3	(82,200)

USA's prime time runs from 7 to 11 p.m., CBN's from 7 to midnight, Lifetime's full day is 7:30 a.m.-1 a.m., Monday-Saturday, Nickelodeon's is 7 a.m.-8 p.m.; Nick at Nite's is 8 p.m.-7 a.m.; Discovery's and Nashville's is 9 a.m.-3 a.m., BET's is noon-1 a.m., and FNN's is 6 a.m.-8 p.m. A&E figures are the sums of its two program blocks, which run from 8 p.m. to 4 a.m.

Lower priced events seen as way to jump-start PPV

Operators and CTAM get together to work on ways to better market pay-per-view programing

Faced with the realization that the windows and/or the financial split on Hollywood movies for pay per view won't be changing anytime soon, cable operators are now focusing on economically priced events, far cheaper than what exists today, as a way to drive the PPV business forward. At a meeting in Denver, top marketing and programming executives from the MSO's met to devise a new strategy on PPV. Part and parcel of that is the new PPV division created at CTAM, under the head of Bob Westerfield, which will serve as both a coordinator of discussions between PPV constituencies and as a clearinghouse for the cable industry.

"The operators are beginning to see there can be significant PPV profits but that those profits will skew in the near-term future toward events as a result of a greater number of them being made available and a better sense of how to present them," said Jerry Maglio, senior vice president, marketing and programing with United Artists, and co-chairman of CTAM's PPV committee.

"While we have to deal with whatever is offered to us, we feel we should be encouraging those promoters in certain categories to come to us with lesser price events because we feel there may be a market in the $5-$7 range for some of the concerts that haven't done well at $15 or $20," he said.

Events, unlike movies, are perishable, said Lowell Hussey, senior vice president, marketing and programing, Warner Cable. "There is some element of surprise and freshness to them," he said. Developing the event category "could change the way customers use PPV," he said. "If we could truly cause an event habit, we would need two or three options priced reasonably each night. If we could evolve into that, it would be very viable."

What has caused this rethinking is concern about where the present PPV business is headed. "There is a fear right now that the PPV business has kind of hit the wall," said CTAM's Westerfield. What CTAM hopes to do is "pull in the players from every different part of the PPV business. That includes operators, studios, program suppliers, packagers, technology people and consultants. The idea is to try and create an industry bridge" among players who have not been brought together effectively in the past, said Westerfield.

The Denver meeting identified six areas the industry intends to address, said Westerfield. First, is PPV primed by movies or is it an event business? Second, can consumers differentiate between PPV and other home entertainment options? Third, what is the industry doing correctly and incorrectly concerning the marketing of PPV? Fourth, what are the capital investment questions relating to short- and long-term tradeoffs to system upgrades and addressability? Fifth, in what direction is the technology going and how can operators and equipment suppliers better communicate? And sixth, how will a "successful" PPV business be measured? Historically, the margins on PPV have been less—as much as 10 to 20 points less—than other parts of a cable system's operations. "We're assuming it's a 30% to 35% business," said Maglio, and "for the most part an incremental business. We'll accept that. It does not have to look like the rest of the cable business," he said. "Clearly it is not."

One reason United is there, said Maglio, is for strategic reasons, "both from an offensive standpoint in wanting as large a share of the home video market as possible," he said, "and from a defensive standpoint, preventing erosion through other technologies able to provide this type of product, movies primarily."

Tele-Communications Inc. is the largest holdout on PPV and addressability, even though under UA, TCI has significant PPV holdings. The UA merger has brought in PPV operations from United Cable and Daniels into UA. (Maglio said all three companies had "very different observations and conclusions relative to PPV. We're looking to develop a PPV business strategy going forward that will start off basically where each company left off." Maglio said capital assets won't be thrown out, but that

From crest to trough: Week 41 approaches bottom of viewing year

July 4, a day for celebrating American independence, is also one of the worst days of the year for prime time viewership. In fact, the week containing Independence Day typically marks the low point in the prime time year. This year, July 4th fell in the prime time week ended yesterday (Sunday, the final day of week 42, July 3-9). Ratings figures for that week aren't available yet, but week 41, which ended July 2, pushed prime time viewing to a new low. The combined three-network rating for week 41 was a 28.7, representing 25.94 million households delivered. Last year's week 41 ended July 3, and the combined rating was a 29.3. Because the TV household universe last year totaled 88.6 million homes, that combined rating translates to 25.96 million households. Last year's week 42 saw the combined rating figure drop another 0.3 of a point, or 266,000 households, to stand at an even 29.0.

NBC won week 41 with an 11.9 rating and a 23.9 share. ABC came in second with an 8.5/17.3. CBS followed with an 8.3/16.7. The top program for the week, ABC's *Roseanne*, pulled in an 18.4/33. NBC took the next seven slots, leading off with a repeat of *Cheers*. ABC won positions nine and 10 with *Coach* and *Wonder Years*.

Of 78 programs broadcast during the week, 64 were repeats. There were two specials, ABC's *Koppel Report, Tragedy at Tiananmen: The Untold Story*, which earned a 9.0/17, and *Great Circuses of the World*, which delivered a 3.9/10.

Nielsen		Net		Nielsen		Net		Nielsen		Net	
1	18.4/33	A	Roseanne	27	11.1/23	A	Growing Pains	53	8.0/18	F	America's Most Wanted
2	18.4/35	N	Cheers	28	11.1/22	N	ALF	54	7.9/20	N	227
3	17.2/32	N	Dear John	29	11.0/21	N	Miami Vice	55	7.8/15	A	Hooperman
4	15.6/31	N	Different World	30	10.8/19	C	Newhart	56	7.8/17	C	West 57th
5	15.6/30	N	L.A. Law	31	10.8/21	N	NBC Sunday Movie	57	7.7/14	A	Robert Guillaume Show
6	15.0/29	N	Night Court	32	10.7/22	A	Just the Ten of Us	58	7.2/14	C	Wiseguy
7	14.9/31	N	Cosby Show	33	10.6/23	A	Mr. Belvedere	59	6.0/14	N	Magical World of Disney
8	14.6/33	N	Empty Nest	34	10.6/20	N	Hogan Family	60	5.8/14	A	ABC Saturday Movie
9	14.1/25	A	Coach	35	9.8/19	A	MacGyver	61	5.8/11	C	Cavanaughs
10	14.1/27	A	Wonder Years	36	9.7/23	N	Amen	62	5.7/13	A	Man Called Hawk, special
11	14.0/32	N	Golden Girls	37	9.4/17	C	Doctor, Doctor	63	5.7/13	C	Beauty and the Beast
12	14.0/25	N	NBC Monday Movie	38	9.3/22	A	Perfect Strangers	64	5.6/10	C	Coming of Age
13	13.8/27	N	Matlock	39	9.3/17	C	Circus of the Stars	65	5.5/11	C	Hard Time on Planet Earth
14	13.8/26	N	My Two Dads	40	9.2/18	C	CBS Sunday Movie	66	5.4/11	A	ABC Thursday Night Baseball
15	13.6/27	A	Who's the Boss?	41	9.1/18	C	Kate and Allie	67	5.4/13	C	Paradise
16	13.3/29	C	Murder, She Wrote	42	9.1/19	N	NBC Friday Movie	68	5.3/10	C	CBS Summer Playhouse
17	13.0/23	N	In the Heat of the Night	43	9.0/16	A	ABC Monday Movie	69	4.9/11	C	Tour of Duty
18	12.9/26	N	Unsolved Mysteries	44	9.0/17	A	Koppel Report	70	4.9/12	F	21 Jump Street
19	12.7/32	C	60 Minutes	45	8.8/18	C	48 Hours	71	4.3/11	F	Cops
20	12.7/28	N	Hunter	46	8.6/18	C	CBS Friday Movie	72	4.2/9	F	Garry Shandling's Show
21	12.3/24	N	Midnight Caller	47	8.6/16	C	Heartland	73	3.9/10	A	Great Circuses of the World, special
22	12.1/21	C	Designing Women	48	8.6/18	F	Married...With Children	74	3.7/8	A	Have Faith
23	11.6/23	A	20/20	49	8.5/17	A	ABC Sunday Movie	75	3.5/7	F	Tracey Ullman
24	11.6/21	C	Murphy Brown	50	8.3/16	C	Equalizer	76	3.2/6	F	Duet
25	11.3/22	A	Head of the Class	51	8.3/19	N	Highway to Heaven	77	3.2/8	F	Reporters
26	11.2/25	A	Full House	52	8.0/16	A	China Beach	78	2.1/5	F	Beyond Tomorrow

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